

METHOD AND SYSTEM FOR EVALUATION OF POTENTIAL
FUNDING SOURCES FOR FINANCIAL PLANS

ABSTRACT OF THE DISCLOSURE

Embodiments of the invention include a system and method for comparing
5 financial products as funding sources for a financial plan, such as a non-qualified
supplemental benefit plan or an individual financial plan. Such embodiments include
selecting two or more financial products for comparison of a set of attributes, assigning
a weight to each of the attributes, scaling the values of the financial products across each
attribute, multiplying the scaled values by the assigned weights, and generating a
10 weighted score for each financial product by summing the weighted scaled values for
each product. Various tradeoffs in selecting one product over another can be
determined by changing the assigned weight for at least one of the attributes in a
subsequent comparison.

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